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Children's Television in Transition: Policies, Platforms and Production

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There is no doubt that children's screen media are currently undergoing a period of rapid technological, regulatory and economic change, just like screen media for adults. Yet the policy and industry implications of these changes for children's content are often overlooked when commentators, usually referencing the US, or developed markets in Europe and Australasia, refer to the 'post-television era', or even a new golden age of television, heralded by internationally distributed online players such as Netflix and Amazon.

Children's television has of course long been subject to powerful globalizing forces. Largely US-owned conglomerates have provided children worldwide with the same channel brands (Disney, Nickelodeon, Turner/Cartoon Network) and familiar, hugely popular content including ubiquitous animated series like *SpongeBob SquarePants* and *Dora the Explorer* from Nickelodeon or new movie classics like *Frozen* from Disney. Digital transmission and the multiplication of children's channels contributed to the opening of national markets in the early 2000s, accompanied by more concentrated vertically integrated transnational ownership structures. These involved the established global brands, but also saw toy manufacturers like Mattel and Hasbro become more involved in screen production. This period also saw the emergence of strong regional players (DHX and Corus in Canada and Al Jazeera Children's/JCC in the Middle East – rebranded as JeemTV in 2013).

Even before this concentration of market power, producers in smaller English-speaking markets such as Australia, New Zealand, Ireland and the UK had long become inured to having to bring together funding from many different international sources to fund production. While globally appealing content is available everywhere, in apparently abundant oversupply, efforts have been made in many countries to sustain domestic television production for children. Within policy circles, locally produced content is often perceived as making an important contribution to sustaining citizenship/allegiance and national cultural representation. In many instances, regulatory interventions such as expenditure requirements in Canada, transmission/production quotas for commercial channels in Australia or state investment in content (e.g. JCC in Qatar), are seen as a bulwark against a perceived overwhelming volume of overseas content (mostly from the US). Interventions by local regulatory regimes also serve to limit or prevent the distribution of content that is regarded as out of step with national or prevalent cultural mores – and potentially damaging to children’s perceived identities and development.

This emphasis on the national in policy initiatives outside the US stands in stark contrast to the multiplicity of mainly commercial providers (broadcast, cable, satellite) which are either foreign-owned (mainly from the US) or which acquire mainly animated content from cheaper international sources. What has irrevocably changed in recent years is the proliferation of children’s media offerings facilitated by the Internet and particularly YouTube, which (unless they are blocked) are distributed seamlessly across national borders. Within this transforming landscape children’s television is now produced and distributed in a complex globalized media environment, characterized by convergence and multiplatform delivery. In developed markets and increasingly in developing markets (where there is often little indigenous children’s content) children have become gradually more platform agnostic, accessing content on demand and on the move on mobile devices. Within these pull

distribution scenarios, television programs for children continue to be popular with children, regardless of how they are distributed.

Yet distribution away from advertiser-funded broadcasters and financially strapped public service media towards online platforms is proving hugely disruptive to the financial structures underpinning the funding of children's content, which have always been precarious. Supplying dedicated content for a small section of the audience (mostly children under twelve) in small geographically bounded nation states is rarely financially rewarding. The arrival of services like Netflix and Amazon and a dedicated YouTube children's app have further complicated the global production ecology. Netflix and Amazon cater largely for a transnational (US-led) audience while YouTube offers swathes of content that appear largely unregulated by national regulatory bodies and often blur the distinction between commercial and non-commercially driven content. Legacy broadcasters and subscription channels now compete with online services for children's attention, both as viewers and crucially as potential consumers of merchandise (toys and other consumer products) which underpin the finances of many globally distributed animated properties.

This special issue on Children's Television in Transition reflects a longstanding MIA tradition of considering policy and production issues related to children's television from an Australian viewpoint, but also from a broader international perspective, comparing and contrasting issues in different international contexts. This is the third special issue on children's media. Like earlier special issues, this issue confirms the importance of local content within an increasingly globalized children's media sector.

In 1979 when MIA's first ever themed issue 'Children and The Media' was published, children's television was a relatively simple business in Australia and other parts of the world. There were no dedicated children's channels, and children's programming was confined to short dedicated blocks on general broadcast channels, screened when children

were available to view (after school or on Saturday mornings) rather than when they may have wanted to view. Children's television programs were scarce, often repeated, and often dominated by imports. In many countries commercial broadcasters were not interested in the child audience because they were economically unattractive. In response to concerns about the paucity of children's content on Australian commercial television, the policy instrument The Children's Television Standards (CTS) had just been introduced. As a targeted policy response it meant that for the first time, free-to-air Australian commercial networks 7, 9 and 10 had to broadcast minimum levels of age-specific Australian programming including, from 1984, local drama, made especially for Australian children. With the establishment of the Australian Children's Television Foundation (ACTF) in 1982, for the first time a Commonwealth-funded children's media advocacy body was brought into being, whose purpose was to support, develop and assist Australian producers to distribute high quality, Australian children's television in local and international markets. In Australia locally produced television had become a policy issue, promoted by an informed advocacy group.

The next two decades saw Australian commercial free-to-air networks make significant (if sometimes reluctant) investments in television for children, including high quality, live action dramas that told quintessentially Australian stories, such as Seven's *Round The Twist* (1989-2001) and *Crash Zone* (1999-2001), Nine's *Mortified* (2006-7) and *Lockie Leonard* (2007-10), Ten's *Ocean Girl* (1994-97), *Legacy of the Silver Shadow* (2002) and *Wicked Science* (2004), that surpassed the number of drama productions by public service broadcaster, the ABC. International considerations always played a significant role however, because despite the cultural specificity of these series, which the CTS required to have a distinctively Australian look and feel, the industry relied on international sales and investment to cover the majority of their production costs (Potter, 2015). Fortunately the very elements that producers were encouraged to foreground in their programs, particularly

Australian beach and waterside locations, also proved appealing to European partners, such as German public broadcaster, ZDF, a longstanding production partner with Network 10. With greater investment from commercial and overseas investors, Australian children's television quickly developed an international reputation for excellence; by 1993 *Round The Twist* was the highest rating children's program in the UK, watched by 5m children a week (Edgar 2006).

In 1999 a second themed MIA issue, 'Children's Television Policy: International Perspectives' edited by Wendy Keys and David Buckingham brought a more international perspective to children's television, reflecting greater global integration of the industry. Focusing on the issues surrounding policy intended to support quality, local television for children in both Australia and internationally, Keys described children's television as a 'barometer of the Australian media climate' (1999: 9). At the time of this themed issue however, television's transition from analogue to digital transmission (technology which Rupert Murdoch introduced to the UK via BSkyB in 1998) had not yet occurred in Australia and many other markets. There were still few dedicated children's channels internationally, and publicly and commercially funded general broadcast channels remained the main supporters of children's content. Content was still scarce. Australian Networks 7, 9 and 10 remained Australia's only commercial free-to-air channels and the largest investors in children's television. Public service broadcaster the ABC, in contrast, produced much smaller amounts of local children's television, because lacking specific charter obligations to provide such content, it was in a position to de-prioritise the child audience when its funding came under pressure (Potter 2015a).

As this themed issue illustrates, children's television is now an extremely complex, globalized business involving large-scale repeats and repurposing for different platforms. The coordination, distribution and management of children's television has never been as globally

organised and configured as it is now. As television adapts to its new circumstances SVOD and OTT services Netflix, Amazon Prime and YouTube compete for audiences with the dedicated children's channels offered by public service broadcasters like the ABC and BBC. In Australia, the CTS content quotas remain for advertiser-funded free to air networks 7, 9 and 10, but are now largely filled with animation rather than live action drama, because animation attracts overseas funding and requires less domestic investment. The ABC has had its own children's channel, ABCME (formerly ABC3), since 2009, but in 2015 the channel's program budget was virtually halved, with local content targets reduced from 50 to 25% of the schedule (Potter 2015b). In New Zealand children's television producers compete for limited funding from state body NZ on Air alongside other 'genres' perceived to be at risk of market failure, meaning that most local children's content is inexpensive, magazine style programming with a short shelf life (See Zanker in this issue).

In line with current trends associated with how children's content is increasingly distributed and accessed in a convergent media market, this issue concentrates on the issues forcing broadcasters, service providers, producers and other stakeholders to formulate new strategic and policy responses. Their responses are required to take account of children's changing consumption patterns, ever greater financial pressures on originating content and the advance of new transnational players in a rapidly changing marketplace.

This themed section for the May 2017 issue brings together four commentary pieces from industry practitioners and children's media advocates and eight articles from international researchers. Contributions cohere around the theme of children's television in transition. The commentaries maintain the MIA tradition of creating dialogue between academics and non-academics, starting with contributions from three of Australia's most influential figures in children's television: Kim Dalton, ABC Director of Television 2006-12 (during which Australia's first free to air children's channel ABC3 was launched), Jenny

Buckland, CEO of the ACTF and Michael Carrington, appointed Head of Children's and Education of the re-named ABC children's channel, ABCME in 2016. The final commentary piece by Greg Childs, Yara Farran and Sam Lawyer, concentrates on the activities of the UK advocacy organization, the Children's Media Foundation.

Kim Dalton highlights the threat to local children's content on the ABC, which has no Australian quotas on its dedicated children's channel and no secured funding for children's content, meaning at times of fiscal pressure the ABC can and does cut funding for the production of local content. Jenny Buckland is similarly concerned about the future of local children's content, particularly live action drama, which is increasingly being displaced by the globalised content produced and distributed by US corporations, which rely on merchandise and branding associated with their children's brand to generate revenues. Michael Carrington on the other hand remains optimistic that the ABC will continue to work with the independent production sector to commission culturally specific television for children but warns of the risks of the PSB becoming virtually the only commissioner of Australian children's content, as has happened in the UK with the BBC.

In their commentary piece, Greg Childs, Yara Farran and Sam Lawyer detail the key issues affecting children's television in the UK. These are broadly similar to Australia's, with commercial networks minimising their investment in children's content and increased pressure on public service broadcasting to assume responsibility for the provision of local content at a time when its funding is being eroded. Crucially the CMF also draws attention to a more holistic appraisal of children's content, which not only considers the threat to production funding and the role of the BBC, but also acknowledges the risks and benefits of the internet including the need for tighter regulations and funding that looks beyond production by the BBC.

The first two research articles consider approaches to regulatory compliance in two very different environments. In her article on public service broadcasting and compliance practices ‘Regulating contemporary children’s television: how digitisation is re-shaping compliance norms and production practices’, Anna Potter draws on original interview material with industry participants to detail the ways in which the regulation of children’s television in Australia and the UK, including editorial decision making and program compliance practices have been affected by the processes of digitization. Despite PSB’s commitment to diversity and robust content, changing parental expectations for dedicated children’s services are leading to a growing conservatism in program production and commissioning. Content intended to appeal to teenage audiences, particularly live action drama, has been a key casualty of the altered production practices and compliance norms engendered by digital abundance.

By contrast Naomi Sakr’s piece on regulation of children’s content in Arab countries ‘Provision, protection or participation? Approaches to regulating children’s television in Arab countries’ underlines the difficulties of regulating in an environment that is heavily reliant on imports, but far from transparent about compliance issues, because of a lack of rule-making structures that might benefit children’s content. In spite of growth in provision of Arab channels targeted at children, mostly funded from Jordan and the Gulf, policy and regulation relating to the production and acquisition of children’s content in the region have remained largely opaque. This is particularly the case regarding what is culturally acceptable for children, based on a narrow interpretation of cultural norms and traditions that are designed to shield governments (and by extension regulatory bodies and broadcasters) from scrutiny.

The proliferation of media outlets and changes in children’s media consumption habits are a clear challenge to legacy media, undermining the funding of traditional children’s television content on broadcast or PSB outlets. With fewer viewers there is less justification

for publicly funded children's media and as audiences fragment, advertising-funded children's media becomes unsustainable. Jeanette Steemers' article 'International perspectives on the funding of public service media content for children looks at how policy-makers in Australia, Canada, Denmark, France, Ireland, New Zealand and the United Kingdom are approaching the funding of public service content for children in a more challenging and competitive multiplatform media environment in countries with a tradition of public service content for children. Focusing on interventions that go beyond provision by PSBs to include a variety of quotas, and alternative or contestable funds that finance content outside of public service institutions, Steemers concludes that policy-makers are ill-equipped to deal with the funding challenges of producing domestic content in a rapidly changing production ecology characterised by uncertainty. Steemers argues that alternative contestable funds (currently being considered in the UK, but operating in Denmark, Ireland and New Zealand) are too wedded to broadcasting models to offer a future-oriented funding approach that tackles children's changing consumption habits.

This lack of efficacy in regulatory approaches, particularly as they relate to funding is picked up by Ruth Zanker's piece on the situation in New Zealand 'The future isn't coming; the future is here: The New Zealand Children's Screen Trust's engagement with media policy for children'. Here there is no state-funded system of public service broadcasting, and all public funding for children's content is channelled through New Zealand on Air's contestable fund. Despite sustained efforts by advocacy groups particularly The New Zealand Children's Screen Trust, the 2015 strategic review of New Zealand children's media provision by NZ On Air has, according to Zanker, failed to address the challenges and opportunities new means of content delivery have created for culturally specific children's content in New Zealand. The pressures associated with reduced funding for children's content are

compounded by a de-regulated media system with no dedicated public service distribution platform.

As children's consumption of screen content is shifting to other platforms and devices (Ofcom 2016), three articles consider the issues raised by this development. Sonia Livingstone and Clare Local raise concerns about the adequacy of current audience measurement techniques that appear to show that children are deserting television for the internet, when children are clearly watching television on other devices, and accessing the internet on television sets. As these measurement techniques do not accurately record how television programs are being watched on internet-enabled devices, they may well wrongly suggest that children are watching much less television than they are, particularly PSB offerings. Such shortcomings are highly problematic, Livingstone and Local argue, at a time when public service provision for children is falling, and when broadcasters and politicians might use the information to downplay investment in original content.

Clearly the internet and YouTube in particular are changing the way children consume television, with YouTube's influence extending well beyond its dedicated children's app. In their article, 'Toy Unboxing: Living in a(n unregulated) material world', David Craig and Stuart Cunningham draw on original interviews with content creators to explain a new form of entrepreneurial creative labour, so-called toy unboxing videos, which are often produced by children themselves and distributed across social media. Unboxing videos pose new regulatory challenges for those who seek to protect children from exposure to advertising while simultaneously raising concerns about the increasingly commercialized content and consumerism with which children are confronted online.

In contrast, YouTube is also emerging as an important educational tool for Australian teachers, with Michael Dezuanni, Stuart Cunningham and Ben Goldsmith's article 'Teachers' curation of Australian screen content for school-based education' revealing how teachers are

curating YouTube content to enhance their students' learning. The research discussed in the article was conducted for the ARC Linkage Project Australian Screen Content in Education project¹, and reports on interviews with 150 teachers in four Australian States and one Territory.

The challenges for even that most iconic of children's television programs during television's transition are further explored in Helle Jensen and Kati Lustyik's historical analysis of Sesame Workshop, a non-profit organisation, whose non-profit status and objectives have become increasingly incongruous as it seeks to survive and come to terms with a more challenging international marketplace. Sesame Workshop has come closest to the concept of public service in the US, originally producing content designed to 'educate' children, and becoming a core schedule component on the US Public Broadcasting Service (PBS). Jensen and Lustyik remind us, through historical documentation that commercial considerations relating to merchandising have always been present in the Workshop's deliberations, sustained by international sales. However, this reliance on commercial income has become more prominent in recent years as finances have become more strained – culminating in a broadcast deal with US subscription service, Home Box Office, thereby undermining the Workshop's more egalitarian principles including those of free access.

This special issue provides another chapter in MIA's history of analysing the children's media industry. It is a sector where the political economy relating to policies, platforms and production is too infrequently a subject of investigation. This special edition represents a contribution to this debate and we hope as editors, that it will stimulate analysis in other countries and across a broader spectrum of children's content. As a contribution to furthering this debate, the University of the Sunshine Coast in Australia will be hosting a

¹ The Australian Screen Content in Education (ASC) project was an Australian Research Council project (LP130100031) that ran from 2014 to 2016.

Children's Media Symposium in November 2017. Supported by the ACTF and the ABC, it will bring together scholars, industry leaders and children's media creatives from around the globe for three days of public-facing engagement with stakeholders around children's media.

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